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## **Turkey**

## **Fresh Deciduous Fruit**

## **Annual**

## **2001**

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### **Report Highlights:**

**MY 2001 is expected to be another good year for deciduous production. Fresh apple, pear and table grape exports are projected to increase because of a significant depreciation of the Turkish Lira against other currencies. Fresh apple exports received a subsidy of USD 40 per MT, up to 15 percent of export value, between April 1, 2001 and May 31, 2001. Import duties are 62.3 percent for fresh apples and pears and 56.7 percent for fresh table grapes.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
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Executive Summary .....	1
Production .....	2
Consumption .....	2
Trade .....	3
Stocks .....	3
Policy .....	3
Marketing .....	4
Statistical Tables .....	5
PS&D Table for Fresh Apples .....	5
Export Matrix for Fresh Apples .....	6
Import Matrix for Fresh Apples .....	7
PS&D Table for Fresh Pears .....	8
Export Matrix for Fresh Pears .....	9
Import Matrix for Fresh Pears .....	10
PS&D Table for Fresh Table Grapes .....	11
Export Matrix for Fresh Table Grapes .....	12
Import Matrix for Fresh Table Grapes .....	13

## **Executive Summary**

In MY 2001, Turkey is forecast to have another good year for deciduous fruit production. Apple and pear tree numbers have remained fairly constant over the past several years with production increases coming mainly from improvements in varieties and cultivation practices. Total grape area has declined slightly, even though the area for seedless grapes has been increasing in the last few years. However, overall grape production remained rather constant, primarily due to improvements in varieties and cultivation practices.

Exports of all fresh apples, pears, and table grapes are expected to increase in MY 2001, due to the severe depreciation of the Turkish lira against foreign currencies since last February. Fresh apple and table grape exports increased significantly in MY 2000, while fresh pear exports declined slightly.

In order to protect local growers, a 62.3 percent import duty is applied to fresh apple and pear imports and a 56.7 percent duty to fresh table grape imports from all origins.

To reduce stock levels, fresh apple exports received a subsidy of the TL equivalent of USD 40 per MT, up to 15 percent of the total FOB export value, for exports made from April 1, 2001 through May 31, 2001. However, according to exporters, the benefits of the subsidy were minimized by the late announcement of the program and delayed payments. The GOT has not yet announced a support program for MY 2001 apple exports and provides no financial support for fresh pear and table grape exports.

(US\$ 1.00 is currently worth around TL 1,500,000 compared to TL 650,000 a year ago. The official rate of inflation in Turkey for the last twelve months is estimated at seventy percent.)

## Production

Apple production in MY 2001 (July-June) is estimated at 2.4 MMT, the same level as our revised MY 2000 estimate, which was lowered to reflect unpublished data. In recent years, both the total number of trees and the number of bearing trees for apples have remained fairly stable. Little expansion of the industry is foreseen at this time. Despite stable area and tree numbers, apple production has increased steadily during the last decade, due to higher yields via improvements in varieties and cultivation practices. Although many varieties of apples are grown in Turkey, the major commercial types are red and golden delicious. Amasya apples are an important local variety. The Granny Smith variety has started to be produced by a few large commercial orchards in Turkey and recently started appearing on grocery shelves.

Pear production in MY 2001 (July-June) is estimated at 370,000 MT, slightly lower our revised MY 2000 estimate. PS&D production for MY 2000 was increased to reflect unpublished data. As with apples, the number of bearing pear trees is fairly stable in Turkey and does not vary significantly from one year to another. Variations in production are generally due to weather conditions. Despite stable area and tree numbers, pear production has increased steadily during the last two decades due to higher yields which were the consequence of improvements in varieties and cultivation practices.

Fresh table grape production in MY 2001 (January-December) is estimated at 3.5 MMT, slightly lower than the revised estimate for MY 2000. MY 2000 production was increased to reflect official statistics which carried higher yields. Although total grape area decreased, production increased in response to improved varieties and cultivation practices. Total grape production is rather stable in recent years and generally only varies as a consequence of weather conditions. Official production data by variety or use is not available. However, observers estimate that around thirty-five percent of total fresh grape production is the seedless sultana type, which is mostly dried for raisin production. Industry representatives indicate that the percentage of sultanas has increased in recent years even though sultanas are grown only in three Aegean provinces (Izmir, Manisa and Denizli). The reason for this expansion was the high export demand for raisins and attractive domestic prices for sultana grapes for fresh consumption. Fresh sultana grape production in MY 2001 is estimated at about 1,150,000 MT. Of this total, about 13 percent will be consumed fresh (150,000 MT) and the remaining 1,000,000 MT will be dried to produce about 220,000 MT of raisins (assuming a conversion ratio of 4.5 to 1).

## Consumption

About ninety percent of Turkey's apple production is consumed fresh, about five percent is processed, and about one percent is exported. The remainder is included in fresh consumption as waste. The apple harvest just started. Apples are being sold around TL 500,000 per kg. in the open markets and TL 750,000 per kg. at grocery outlets. About ninety percent of Turkey's pear production is consumed fresh, five percent is processed (and dried), and two to three percent is exported. The remainder included in fresh consumption as waste. Prices for fresh pears vary in between TL 500,000 and TL 750,000 per kg. in local markets and between TL 750,000 and TL 1,250,000 in grocery stores, depending upon the variety. These prices were TL 350,000 and TL 500,000 in markets and TL 500,000 and TL 750,000 in grocery stores a year ago.

An estimated 45 percent of total grape production is consumed fresh, about 35 percent is dried, and 15 percent is processed, mainly for wine. About one or two percent is exported and the remainder is included in fresh consumption as waste. Current prices of fresh table grapes range between TL 500,000 and TL 750,000 per kg. in local markets and between TL 600,000 and TL 1,250,000 per kg. in grocery stores, depending on variety.

## Trade

Although it is very early to make an assessment of fresh deciduous fruit exports for MY 2001, it is estimated they will increase because of a significant devaluation of the Turkish Lira--120 percent against the US dollar since last February. EU and Middle Eastern markets are the major importers of Turkish deciduous fruits. Trade data in MY 1999 and in MY 2000 were revised according to recently available data.

Deciduous fruit imports are minimal and generally occur during the winter, except apples which occur mostly during the summer.

Official foreign trade statistics are only available through May 2001. The MY 1999 trade matrixes for apples and pears are for the entire (July-June) marketing year but the MY 2000 trade matrixes are only for the first eleven months (July-May). Our MY 2000 trade matrix for fresh table grapes covers the entire marketing year (January-December) but the MY 2001 trade matrix covers only the first five months (January - May).

## Stocks

Official stock statistics are not available. Large quantities of apples, pears, and grapes are stored in modern facilities and are sold on the domestic market throughout the year. The remainder is either processed or exported. As a result, few stocks are carried over from one marketing year to the next.

## Policy

There is no support price for fresh apples, pears or table grapes. On January 1, 2001, the GOT again slightly lowered import duties for fresh apples, pears, and table grapes. The old and new duties for fresh apples, pears, and table grapes are as follows:

Product	Tariff Code	Old Duty	New Duty	Affective Date
Fresh Apples	0808.10	62.9	62.3	January 1, 2001
Fresh Pears	0808.20.10 & 0808.20.50	62.9	62.3	January 1, 2001
Fresh Table Grapes	0806.10	57.3	56.7	January 1, 2001

For the April 1, 2001 - May 31, 2001 period, the GOT announced an export subsidy of the Turkish Lira (TL) equivalent of USD 40 per MT, up to 15 percent of the total FOB value for fresh apples. However, the subsidy announcement was made late in the season ( published in the Official Gazette on June 3, 2001 retroactive to April 1, 2001), and delayed payments provided only marginal assistance to exporters.

The GOT does not provide any support for fresh pear and grape exports.

## Marketing

All commercial fresh apples, pears, and table grapes are sold through individual marketing organizations or cooperatives to both domestic and export markets.

## Statistical Tables

**PS&D Table for Fresh Apples**

PSD Table						
Country	Turkey					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	32000	32080	32000	32000	0	32000
Non-Bearing Trees	6000	5850	6000	6000	0	6000
Total Trees	38000	37930	38000	38000	0	38000
Commercial Production	2500000	2500000	2500000	2400000	0	2400000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	2500000	2500000	2500000	2400000	0	2400000
TOTAL Imports	3030	3559	3000	1795	0	1000
TOTAL SUPPLY	2503030	2503559	2503000	2401795	0	2401000
Domestic Fresh Consump	2364205	2364676	2363000	2265291	0	2263000
Exports, Fresh Only	13825	13883	15000	16504	0	18000
For Processing	125000	125000	125000	120000	0	120000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	2503030	2503559	2503000	2401795	0	2401000

**Export Matrix for Fresh Apples**

Export Trade Matrix			
Country	Turkey		
Commodity	Fresh Apples		
Time period	July - June	Units:	Metric Tons
Exports for:	1999	July - May	2000
U.S.		U.S.	
Others		Others	
Saudi Arabia	8735	Saudi Arabia	8659
Northern Cyprus	2443	Egypt	3024
Egypt	1803	Northern Cyprus	2809
Ukraine	274	Southern Cyprus	547
Jordan	215	Jordan	470
Romania	156	Kuwait	331
Bahrain	60	Oman	189
United Arab Em.	60	Ukraine	135
Bulgaria	35	Romania	110
Kuwait	34	United Arab Em.	82
Total for Others	13815		16356
Others not Listed	68		148
Grand Total	13883		16504

**Import Matrix for Fresh Apples**

Import Trade Matrix			
Country	Turkey		
Commodity	Fresh Apples		
Time period	July - June	Units:	Metric Tons
Imports for:	1999	July - May	2000
U.S.	9	U.S.	
Others		Others	
Chile	1492	Chile	769
Italy	1169	Italy	612
France	309	Belgium	148
Greece	178	France	140
Netherlands	93	Namibia	54
Belgium	91	Greece	43
Argentina	61	Georgia	3
South Africa	57		
Iran	33		
Turkmenistan	20		
Total for Others	3503		1769
Others not Listed	47		26
Grand Total	3559		1795



**PS&D Table for Fresh Pears**

PSD Table						
Country	Turkey					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		07/1999		07/2000		07/2001
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Bearing Trees	11000	10820	11000	11000	0	11000
Non-Bearing Trees	2100	2000	2100	2000	0	2000
Total Trees	13100	12820	13100	13000	0	13000
Commercial Production	360000	360000	360000	380000	0	370000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	360000	360000	360000	380000	0	370000
TOTAL Imports	139	151	100	118	0	50
TOTAL SUPPLY	360139	360151	360100	380118	0	370050
Domestic Fresh Consump	329939	329947	330100	349411	0	338550
Exports, Fresh Only	12200	12204	12000	11707	0	13000
For Processing	18000	18000	18000	19000	0	18500
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	360139	360151	360100	380118	0	370050

**Export Matrix for Fresh Pears**

Export Trade Matrix			
Country	Turkey		
Commodity	Fresh Pears		
Time period	July - June	Units:	Metric Tons
Exports for:	1999	July - May	2000
U.S.		U.S.	
Others		Others	
Saudi Arabia	4530	Saudi Arabia	4965
Germany	2386	Germany	2666
Austria	1730	United Arab Em.	817
Northern Cyprus	842	Netherlands	729
Netherlands	689	Northern Cyprus	673
Romania	416	Austria	308
Jordan	186	Jordan	271
United Arab Em.	172	Israel	158
Belgium	169	Russia	156
Israel	160	Romania	139
Total for Others	11280		10882
Others not Listed	924		825
Grand Total	12204		11707

**Import Matrix for Fresh Pears**

Import Trade Matrix			
Country	Turkey		
Commodity	Fresh Pears		
Time period	July - June	Units:	Metric tons
Imports for:	1999	July - May	2000
U.S.		U.S.	
Others		Others	
Chile	101	Chile	69
Argentina	19	Netherlands	20
Israel	16	Israel	14
South Africa	12		
Saudi Arabia	3		
Total for Others	151		103
Others not Listed			15
Grand Total	151		118

**PS&D Table for Fresh Table Grapes**

PSD Table						
Country	Turkey					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	540000	535000	540000	535000	0	535000
Area Harvested	540000	535000	540000	535000	0	535000
Commercial Production	3400000	3400000	3500000	3600000	0	3500000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	3400000	3400000	3500000	3600000	0	3500000
TOTAL Imports	233	233	250	173	0	100
TOTAL SUPPLY	3400233	3400233	3500250	3600173	0	3500100
Domestic Fresh Consump	1652253	1652253	1700250	1750300	0	1700100
Exports, Fresh Only	47980	47980	50000	64873	0	70000
For Processing	1700000	1700000	1750000	1785000	0	1730000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	3400233	3400233	3500250	3600173	0	3500100

**Export Matrix for Fresh Table Grapes**

Export Trade Matrix			
Country	Turkey		
Commodity	Fresh Table Grapes		
Time period	Jan. - Dec.	Units:	Metric tons
Exports for:	2000	Jan. - May	2001
U.S.		U.S.	
Others		Others	
Germany	22897	Russia	463
Austria	15111	Saudi Arabia	210
Russia	13066	Kuwait	122
Netherlands	4546	Germany	39
Saudi Arabia	4256	Netherlands	36
United Kingdom	1283	Oman	23
Belgium	1012	Denmark	18
Romania	442	Romania	11
Kuwait	356	Bulgaria	2
Denmark	342	Macedonia	1
Total for Others	63311		925
Others not Listed	1562		
Grand Total	64873		925

**Import Matrix for Fresh Table Grapes**

Import Trade Matrix			
Country	Turkey		
Commodity	Fresh Table Grapes		
Time period	Jan. - Dec.	Units:	Metric tons
Imports for:	2000	Jan. - May	2001
U.S.	2	U.S.	
Others		Others	
Chile	68	Chile	49
Argentina	51	Namibia	23
Namibia	39	Turkmenistan	5
Netherlands	5	Netherlands	4
Spain	4		
Turkmenistan	2		
Uzbekistan	1		
Total for Others	170		81
Others not Listed	1		
Grand Total	173		81